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The head of NVIDIA said that the increase in demand for chips for AI has not yet ended

NVIDIA Director General Jensen Juang said that interest in chips for artificial intelligence (AI) will be preserved in the coming years. According to his forecast, the infrastructure market for AI can reach several trillion dollars for five years.

Such a statement sounded against the backdrop of investors' fears about the slowdown in the company's growth. Previously, NVIDIA introduced a prognosis for revenue for the third quarter of about 54 billion dollars, which is only slightly higher than the expectations of analysts. Despite this, the shares of the company have grown by about a third since the beginning of the year.

Juang noted that this year the capital costs of large customers, including Microsoft and Amazon, can be about $ 600 billion to data centers. According to him, during the construction of one center worth 60 billion dollars, the share of NVIDIA in the supply of equipment can reach 35 billion.

According to the company, a significant part of the new generation chips Blackwell are already reserved by customers until 2026. At the same time, the processors of the previous Hopper series also continue to be actively purchased. One of the buyers acquired the H20 chips adapted for the Chinese market last week, in the amount of $ 650 million.